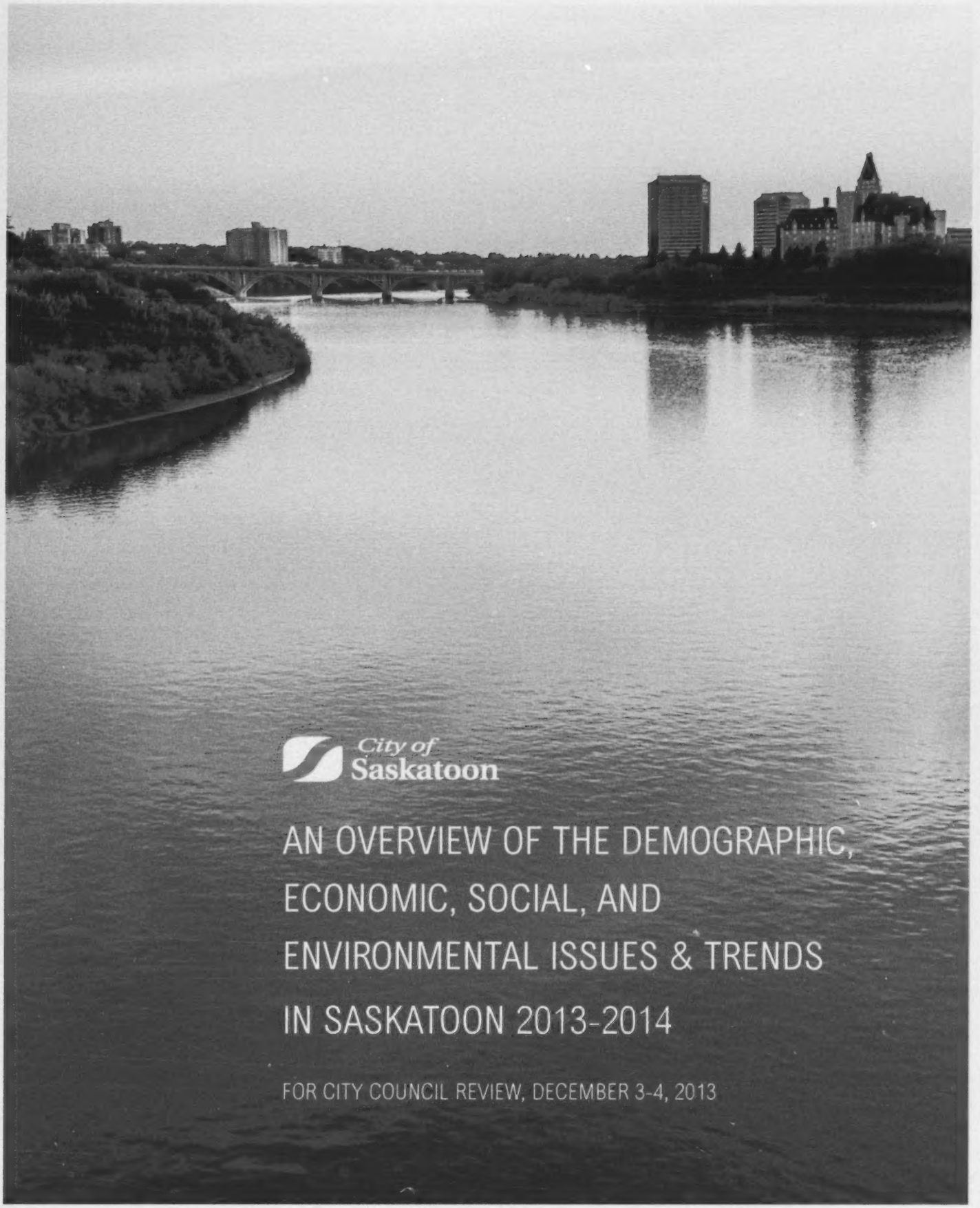


City of Saskatoon

AN OVERVIEW OF THE DEMOGRAPHIC, ECONOMIC, SOCIAL, AND ENVIRONMENTAL ISSUES & TRENDS IN SASKATOON 2013-2014

FOR CITY COUNCIL REVIEW, DECEMBER 3-4, 2013

Statistics Canada instituted the National Household Survey in 2011 to replace the long form Census of previous Census cycles. The National Household Survey methodology is different than that used form the long form Census; it is a voluntary survey, and as a result the response rates to the survey may vary widely over the community.

It is important to note that direct comparison of the results of the National Household Survey to the Census of previous years, may be unreliable because we are unable to verify with confidence whether observed differences are due to an actual change in the characteristic being measured - or caused by the change in methodology. Nonetheless, it is the new methodology going forward.

Review of data that includes both Census survey results and National Household Survey results should be considered knowing that this methodology change has occurred.

ISSUES AND TRENDS IMPACTING THE CITY OF SASKATOON 2013-2014

AN OVERVIEW OF DEMOGRAPHIC, ECONOMIC, SOCIAL, AND ENVIRONMENTAL ISSUES &TRENDS

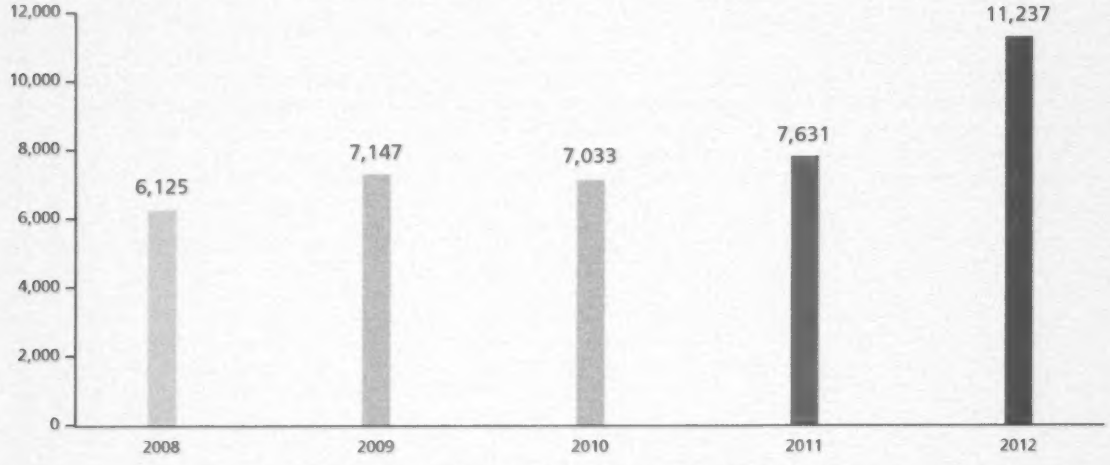
This section of the document provides an overview of key population and demographics; economic, social, and environmental issues and trends that the City of Saskatoon considers and utilizes in developing and preparing its 2014 Corporate Business Plan and Budget. By paying attention to these issues and trends, the City of Saskatoon is able to more efficiently dedicate its human, financial, and technological resources to key programs and services.

Population and Demographic Issues and Trends

Saskatoon's strong economy has resulted in continuous and substantial population increases in recent years. For the third consecutive year, Saskatoon has recorded the strongest growth of any CMA in Canada. Saskatoon's population increased by a rate of 40.4 per thousand; the CMA's of Regina (31.5 per thousand) and Calgary (31.4 per thousand) had the second and third largest population increases in Canada for 2012.

According to Statistics Canada, the population of the Saskatoon CMA – which includes cities and towns such as Martensville, Warman, and Delisle – was 284,008 as of July 1, 2012.

Annual Population Growth Saskatoon CMA



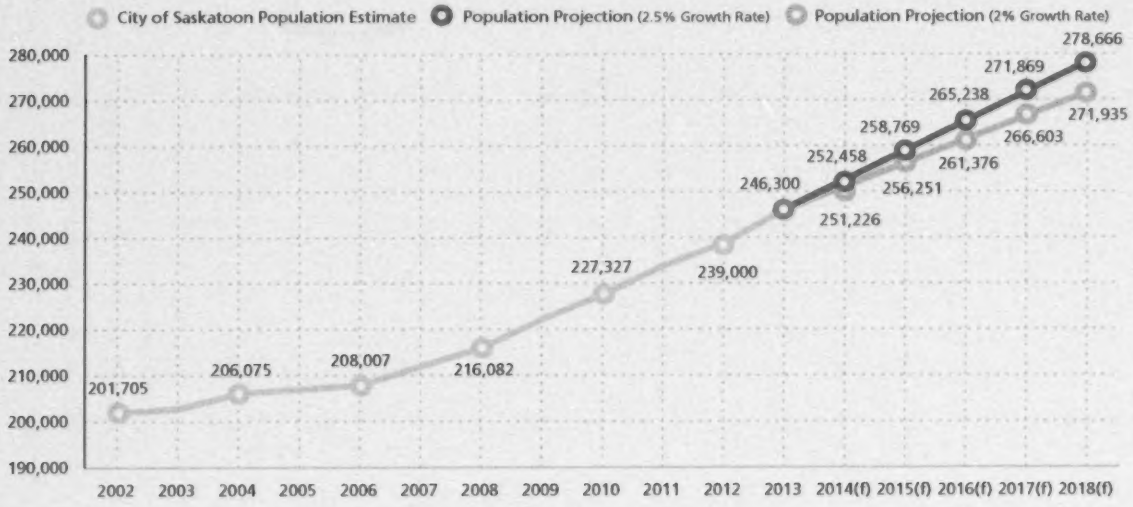
Source: Statistics Canada Annual Demographic Estimates: Subprovincial Areas, 2012

Subsequent charts will break down the sources of the population to provide a better perspective on the types of people moving to the Saskatoon region.

More locally, the City of Saskatoon's internal projections and estimates indicate that as of July 1, 2013, Saskatoon's population had reached 246,300. Since 2006, the city has added over 38,000 new residents averaging 6,000 new residents per year.

The following graph shows high and medium population growth projections for Saskatoon. If these projections materialize, Saskatoon's population will be above 275,000 in just five years.

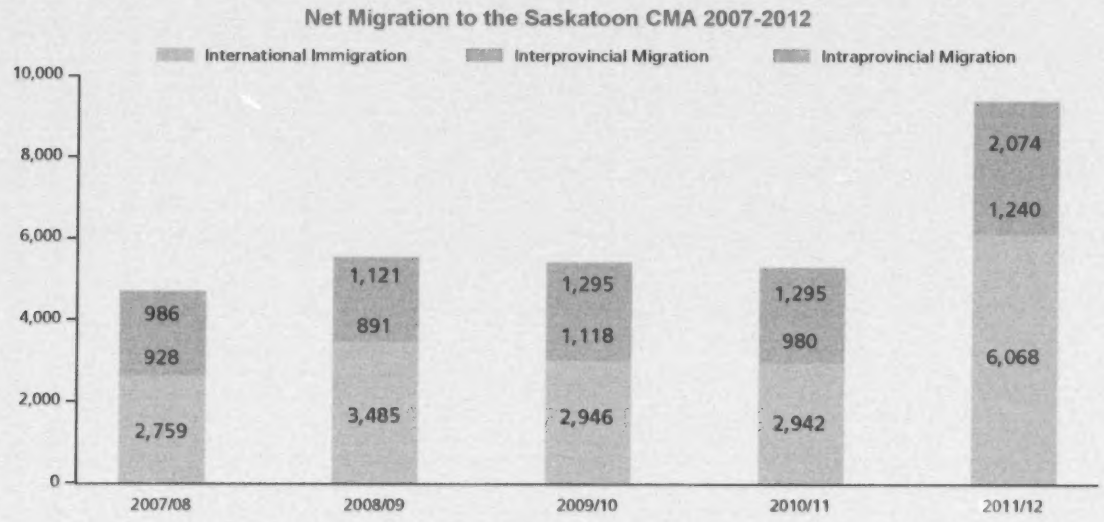
City of Saskatoon Population Growth, Projection: 2002-2018(f)



Source: Statistics Canada, City of Saskatoon Population Estimates, July 2013

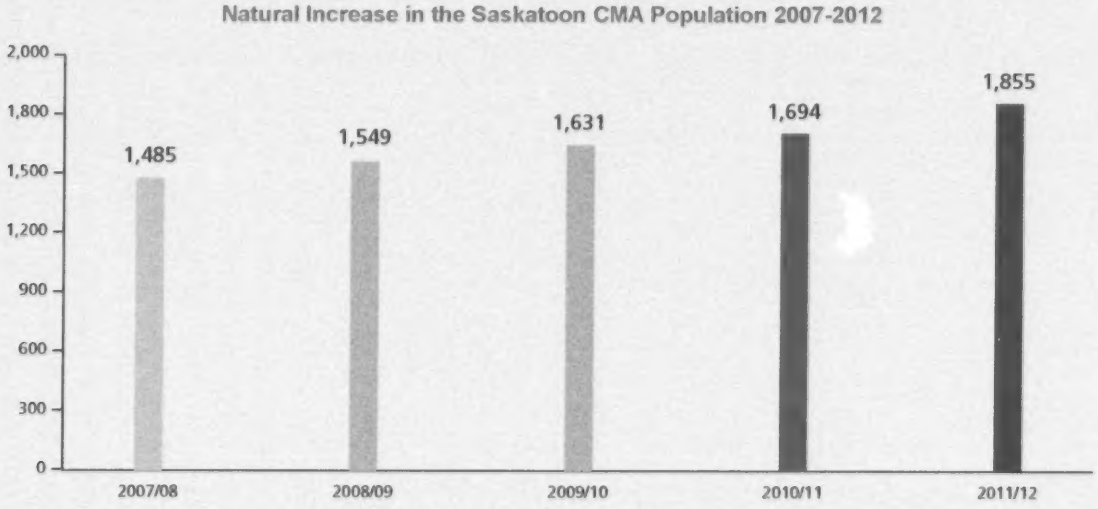
Saskatoon's strong population growth has been driven primarily by international immigration. As shown in the charts below, 65% of net migration in the CMA has come from international immigration.

Moreover, the population data reveals significant increases in both net interprovincial (more people moving from other provinces) and intraprovincial (more people moving from Saskatchewan communities) migration. This means more people are moving to, rather than moving from, Saskatoon from other cities and communities across Canada and Saskatchewan.



Source: Statistics Canada Annual Demographic Estimates: Subprovincial Areas, 2012

Another important component of population growth is the number of births over deaths, referred to as the "natural increase in population". As shown below, the Saskatoon CMA is experiencing a "baby boom" of sorts. This positive trajectory indicates that more daycare spaces, schools, and recreation facilities will be required to accommodate this growth.



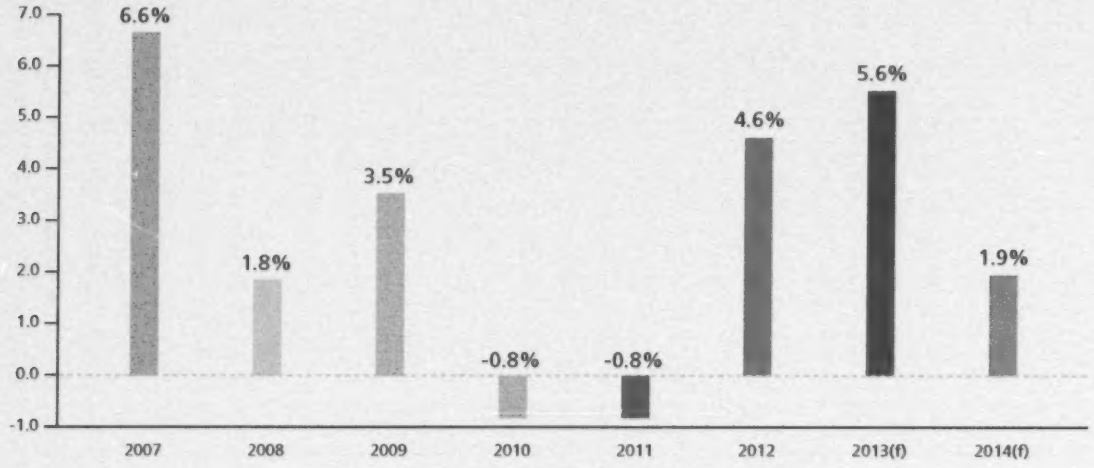
Source: Statistics Canada Annual Demographic Estimates: Subprovincial Areas, 2012

Economic Issues and Trends

Saskatoon is Saskatchewan's largest city. With a growing population and a thriving business sector, Saskatoon has positioned itself as an attractive and vibrant city that is a primary engine of the Saskatchewan economy. Notwithstanding the global economic challenges, Saskatoon's diverse economy, low unemployment, healthy real estate market, and rising incomes, all indicate that Saskatoon will continue to grow and prosper, becoming an even more attractive and competitive city.

One factor driving Saskatcon's population growth is the abundance of job opportunities that are available in the city. Employment growth in 2013 and 2014 is projected to be significant as the economy continues to be strong.

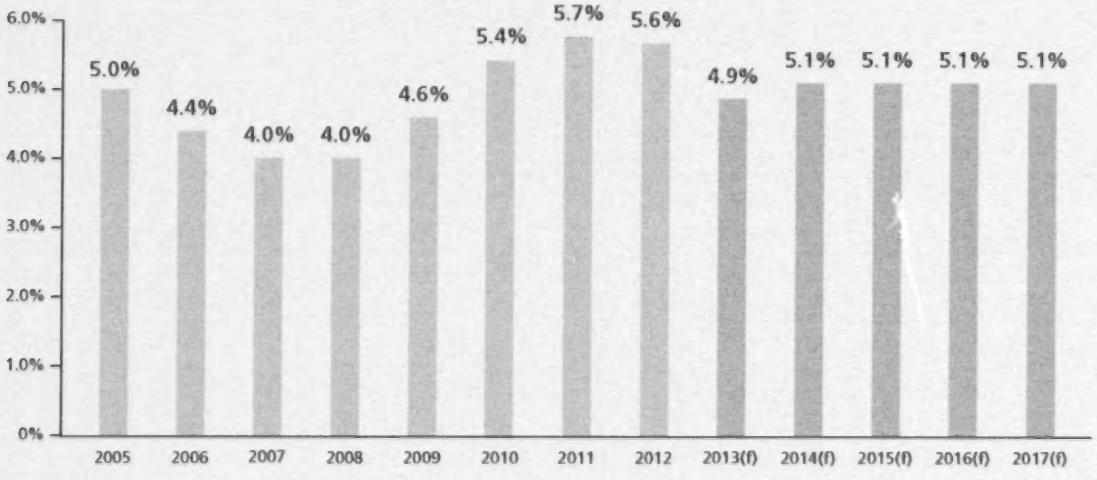
Saskatoon Employment Growth 2007-2014(f)



Source: Conference Board of Canada

As shown below, Saskatoon's unemployment rate is projected to fall slightly in 2013.

Saskatoon's Unemployment Rate 2005-2017(f)



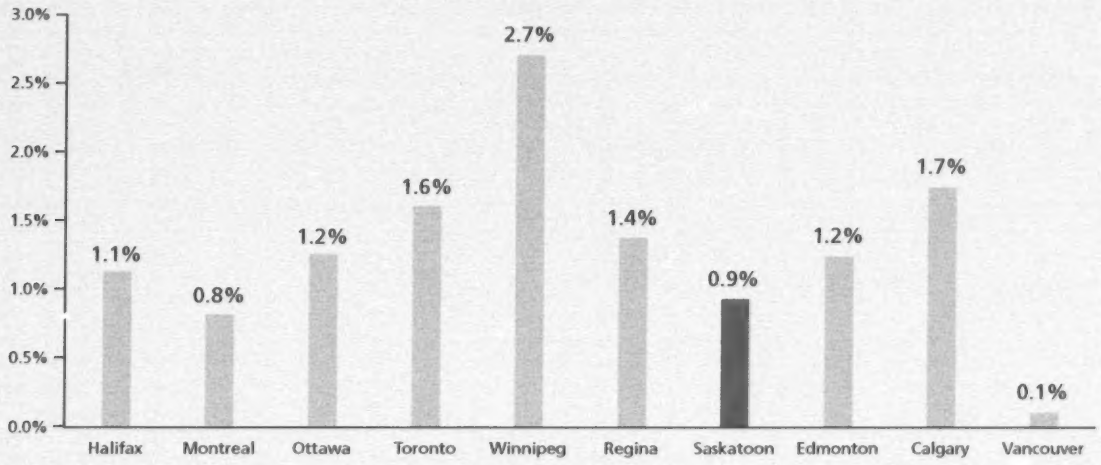
Source: Conference Board of Canada: Metropolitan Outlook Spring 2013

Inflation

Municipal governments are under considerable pressure to relate their spending and taxation levels to the cost of inflation, yet each municipal government's experience with inflation can differ greatly from a national average. The most widely applied measure of inflation in Canada is the Consumer Price Index (CPI).

The CPI measures the price changes for common household purchases, such as food, shelter, clothing, household operations, and furnishings; these are items that a municipal government typically does not purchase to provide programs and services to its citizens. However, given the CPI's pervasive use in setting cost-of-living adjustments (COLAs), it can be the appropriate metric when calculating the rate of consumer inflation at the national level.

Consumer Price Index Change by City (August 2012 to August 2013)



Source: Statistics Canada, August 2013

The CPI is a useful proxy for cost inflation in general as it is a well-known statistic and is produced monthly by an independent source (Statistics Canada). However, extending the use of the CPI into discussions on the appropriate level of property tax or fee increases for a municipal government becomes problematic because:

- A municipal government's actual experience with inflation often differs greatly from CPI.
- The "basket of goods" that is consumed by a municipality as compared to an individual or a household is different. For this reason, the Consumer Price Index is not a good indicator.

Generally, this is because the largest expenditures for governments are typically labour, construction materials, and contractual services, which are substantially different factors than those found in the CPI.

For the City of Saskatoon, inflation can be described as the increase in the cost of goods and services that are normally purchased by the City to provide vital programs and services to the citizens of Saskatoon. In other words, inflation is a function of the increase (or decrease) in costs to provide such programs and services as:

- Transportation Services: roads, streets, sidewalks, public transportation
- Utilities: water, wastewater, storm water, solid waste
- Community Support and Recreation Services: parks, recreation, libraries, museums, social services, sport and culture
- Protective Services: fire, police, bylaw enforcement
- Planning and Development: economic, land use, building standards

As such, municipal governments have their own spending patterns and cost profiles that are different than other economic sectors. A price index that does not reflect the municipal purchasing structure is incapable of truly reflecting the changes in the purchasing power of local governments such as the City of Saskatoon.

To better understand and communicate the true inflationary pressures on municipal budgets, the City of Saskatoon has followed the trend of other municipalities and has developed a Municipal Price Index (or Municipal Cost Index). There are two main parts to the MPI calculation: 1) weightings of the expenditure categories (showing the relative importance of items in the index); and 2) the inflation factor used for each component. The weightings for Saskatoon's MPI are based on the approved operating budget and include such categories as:

- wages and benefits
- professional and contracted services
- construction materials and commodities
- capital and equipment purchases
- utilities
- land costs
- debt service charges

An MPI for the City of Saskatoon has been calculated to be used for future budgeting benchmarks and will be reviewed annually.

Gross Domestic Product (GDP)

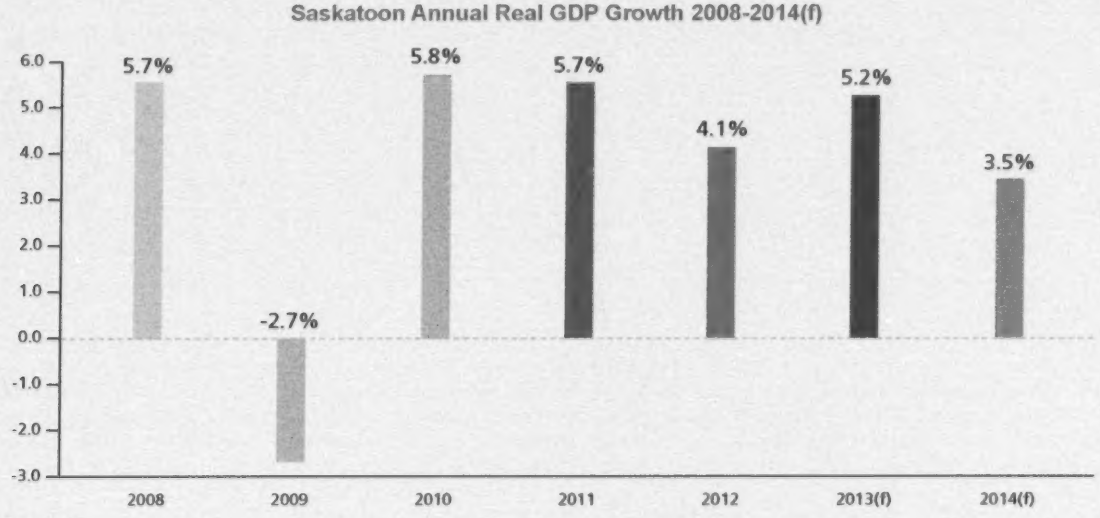
In Canada, and throughout the world, economic output is measured by GDP. GDP is the value of all goods and services produced in a country in a calendar year. The gross domestic product includes only final goods and services, not goods and services used to make another product. Changes in the GDP are an indication of economic output. At year end 2012, the total value of GDP for the Saskatoon region was $15.46 billion.

According to forecasts by the Conference Board of Canada November 2013, Saskatoon is expected to lead the country in GDP growth by 5.2 per cent.

Source: Conference Board of Canada, November 2013

Source: Conference Board of Canada, November 2013

Since 2008, Saskatoon's GDP has grown by an average of 3.7% annually, and this includes one year of negative growth, impacted by the global economic downturn.

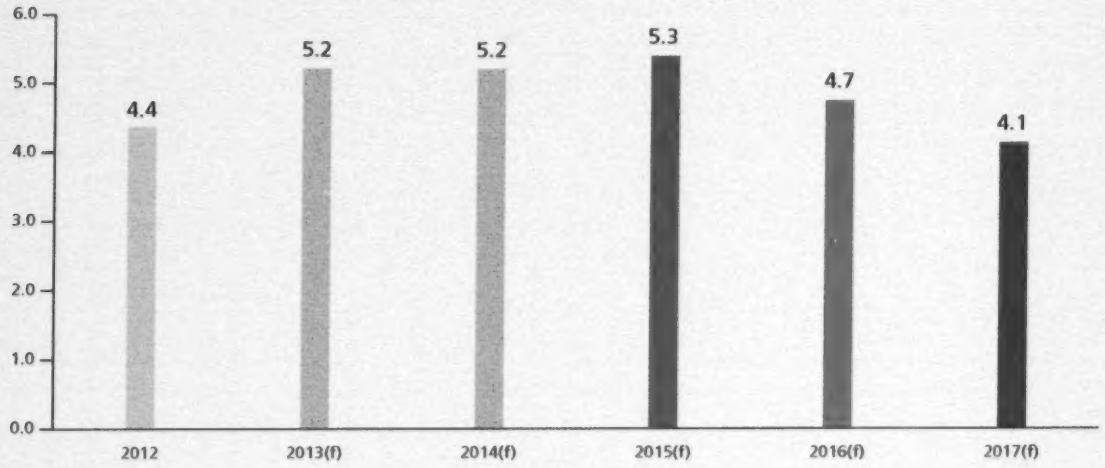


Source: Conference Board of Canada, November 2013

Retail Sales

Saskatoon is expected to see positive retail sales growth. Retail sales information provides a measure of the health and performance of the retail trade sector. As an important industry in the Canadian economy, governments are able to better determine the overall health of the economy and understand the important role that retailers have in the economy.

Retail Sales Growth in Saskatoon 2012-2017(f)

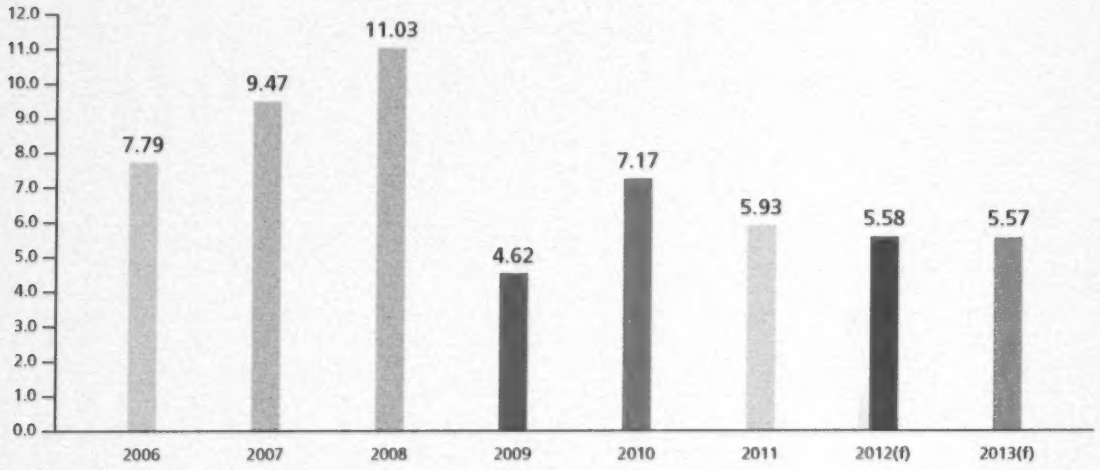


Source: Conference Board of Canada - Spring 2013 Outlook

Disposable Income

Personal disposable income growth in Saskatoon is also expected to rise over the next two years, although at a much slower pace than witnessed in 2007 and 2008. Personal disposable income is the amount left over after payment of personal direct taxes, including income taxes, contributions to social insurance plans (such as the Canada Pension Plan and Employment Insurance) and other fees. It is a measure of the funds available for personal expenditures on goods and services and personal savings for investments as well as personal transfers to other sectors of the economy.

Disposable Income Growth in Saskatoon 2006-2013(f)

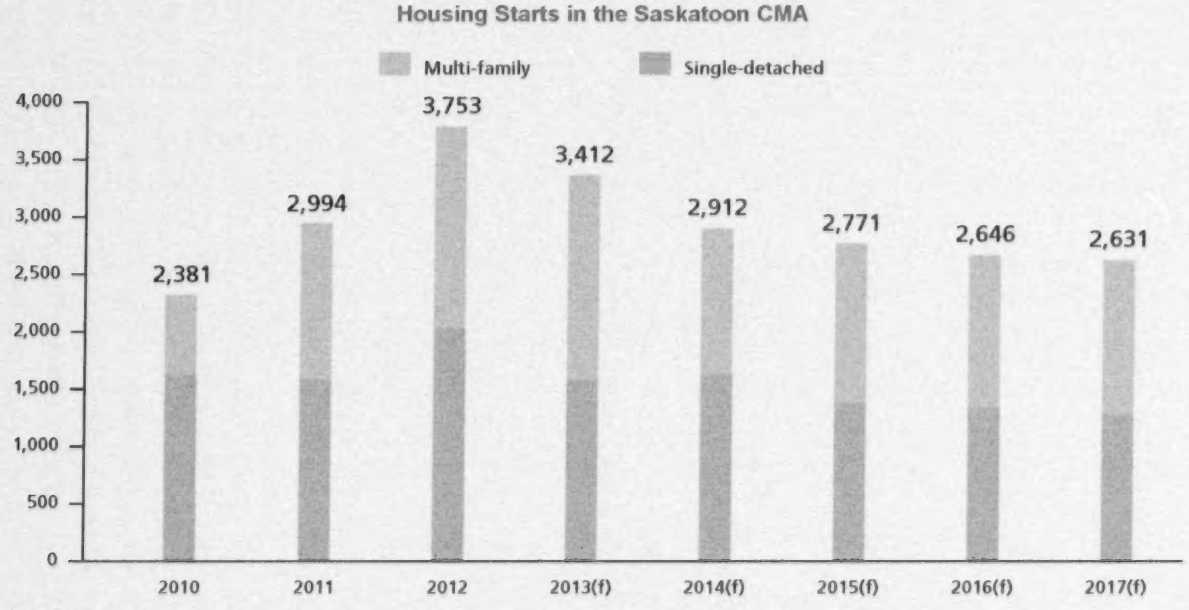


Source: Conference Board of Canada, November 8, 2012 presentation

Housing Sales versus Price Increases

Housing sales have remained strong in Saskatoon since 2011, hovering around 5,100 each year. Housing sales to the end of August 2012 were virtually on par with levels from a year ago; it is expected that existing home sales will total 5,300 units in 2013. A slightly higher level of 5,400 sales is projected for next year.

Source: CMHC - Housing Market Outlook

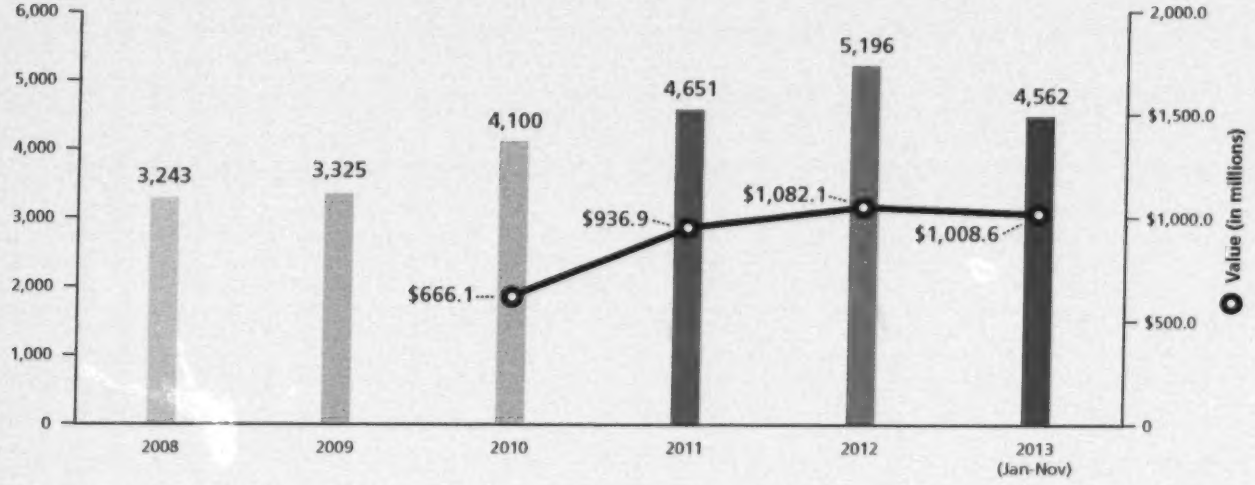


Source: Conference Board Canada: Metropolitan Outlook Spring 2013

Building Permits

For cities, a good indicator of economic activity is the number of building permits issued each year. In 2012, the City of Saskatoon issued more than 5,196 building permits, once again, breaking all previous records. The value of the building permits issued in 2012 was $1,082,100,000; a 15% change over 2011. Continuing on this upward trend, the value of the business permits as of November 2013 is $1,008,599,000.

Building Permits Issued by the City of Saskatoon 2008-2013

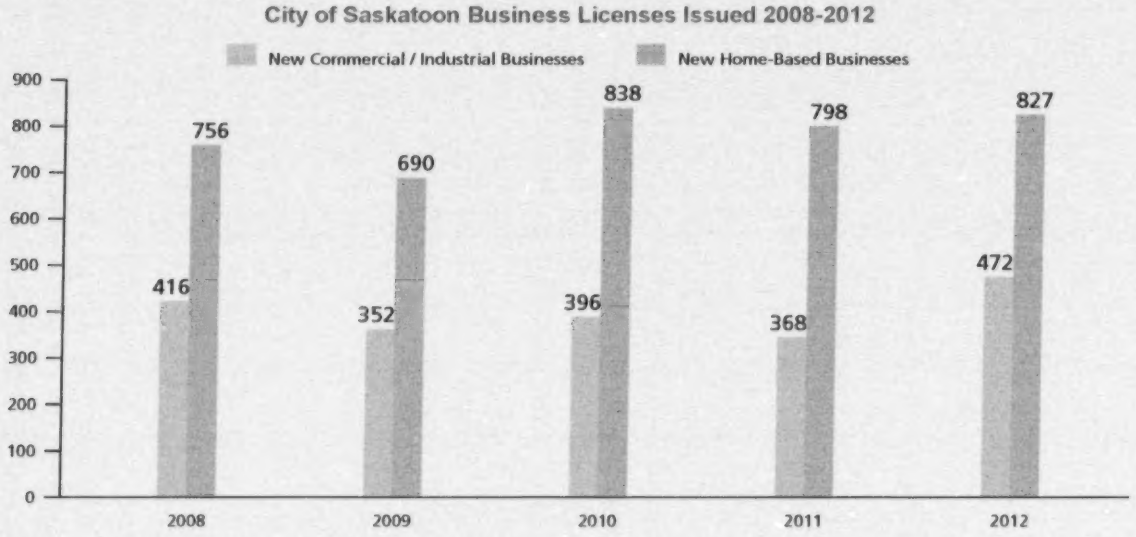


Source: City of Saskatoon, Building Standards Branch

Construction activity in Saskatoon continued this trend in 2012. Both the number of permits and the construction value to the end of the third quarter exceeded those in 2011. What makes this quite notable is that only five projects exceeded $10 million in construction value. Many of the permits issued were for new one and two unit dwellings.

Business Licenses

In 2012, the City issued 1,299 new business licences (472 commercial, and 827 home-based businesses). The total number of businesses licensed has increased by more than 11% since 2007. New business creation continues to be strong in the city, reinforcing job growth and strong economic activity.



Source: City of Saskatoon, Business License Program, "Business Profile - Annual Report 2012"

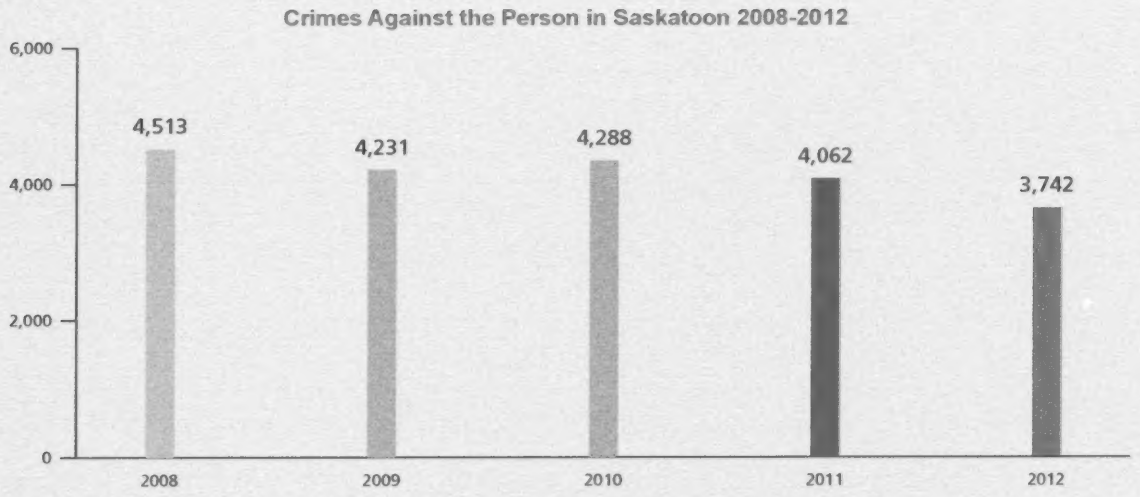
Social Trends and Issues

While population and various economic growth indicators are important in determining the level of economic activity in Saskatoon, the City of Saskatoon also realizes that these are not the only factors that have an impact on the programs and services that the City provides to its citizens. Civic programs contribute to the overall quality of life experienced by citizens by providing safety services, infrastructure, and recreational activities.

Crime and Public Safety

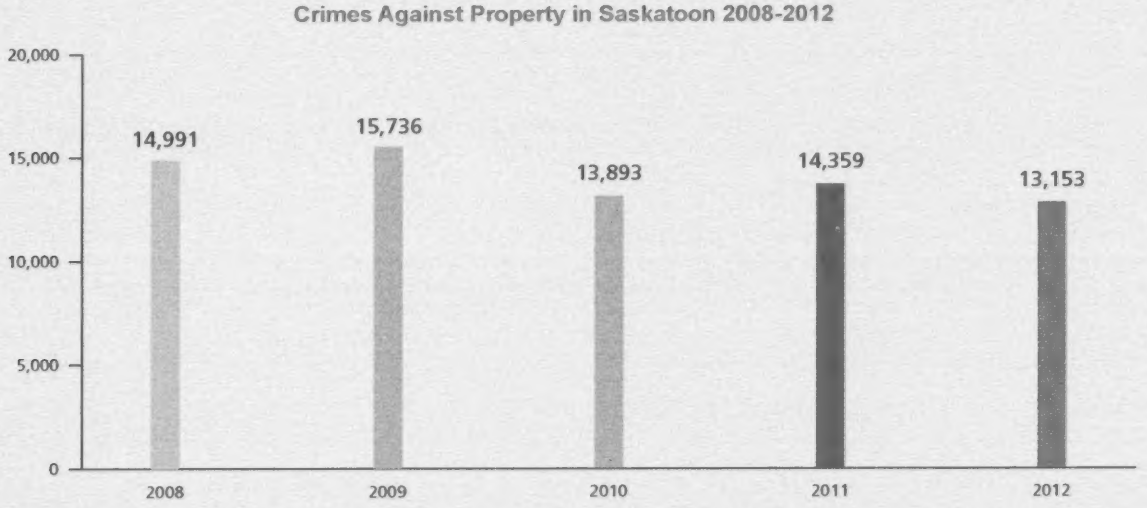
The City of Saskatoon has increased the police budget in recent years to support the Saskatoon Police Service in reducing crime in the community. This investment is paying off. The "perception" of serious crime has improved over the past decade; fewer people rate their safety from serious crime as poor or fair. In 2012, actual reported incidents of serious crime on both per capita and absolute scales has fallen to its lowest point in the last decade.

In contrast to crimes against the person, there was an increase in the total number of crimes against property between 2008 and 2009 of 5% and of 3% from 2010 to 2011. In 2012, total crimes against the person was down 8% as compared to 2011. However, since 2008, property crimes decreased by 12%; since 2011, property crimes have decreased by 9%.



Source: Saskatoon Police Service - Year End Summary Report 2012

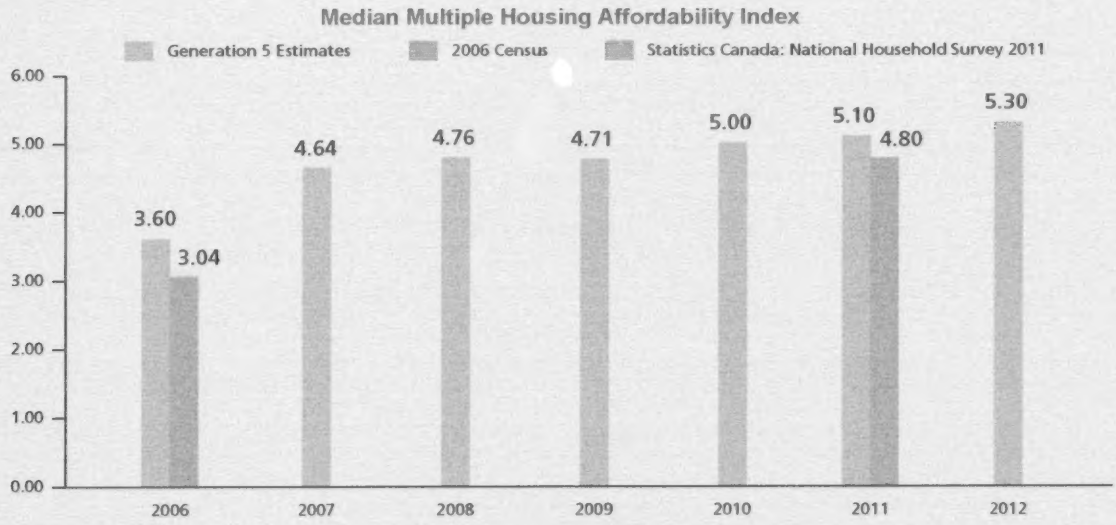
In contrast to crimes against the person, there was an increase in the total number of crimes against property between 2008 and 2009 of 4%. However, since 2007, property crimes have decreased by 19%.



Source: Saskatoon Police Service - Year End Summary Report 2012

Housing Affordability

Housing prices continue to increase. Since 2006, as shown in the following chart, the median price of a home has grown faster than the median income, resulting in an erosion of housing affordability. The Median Multiple is a measure of affordability. It is the ratio of the median income to median house price. The following chart can be read as "in 2012, the median house price was 5.30 times the median income".



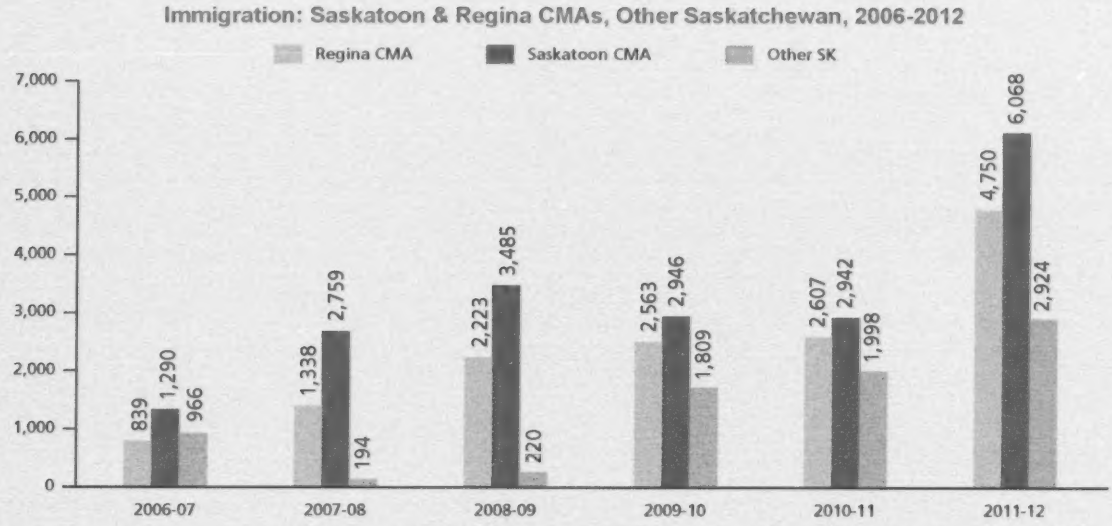
Source: Statistics Canada, G5, and City of Saskatoon

Note: Historically, an index value of 3.0 has been considered to be "affordable"

Although housing is not a traditional responsibility of the City of Saskatoon, the City is aware of the impacts that the lack of affordable housing has on individuals, families, the economy, and the community. As a result, the City of Saskatoon has adopted an innovative Housing Business Plan to help encourage the building of more affordable housing in the city. This Business Plan seeks to define where the City can be more effective in serving the community to meet the pressing need for affordable and entry-level housing. Funding for the Housing Business Plan was committed at $2.5 million per year until the end of 2012.

Immigration Trends

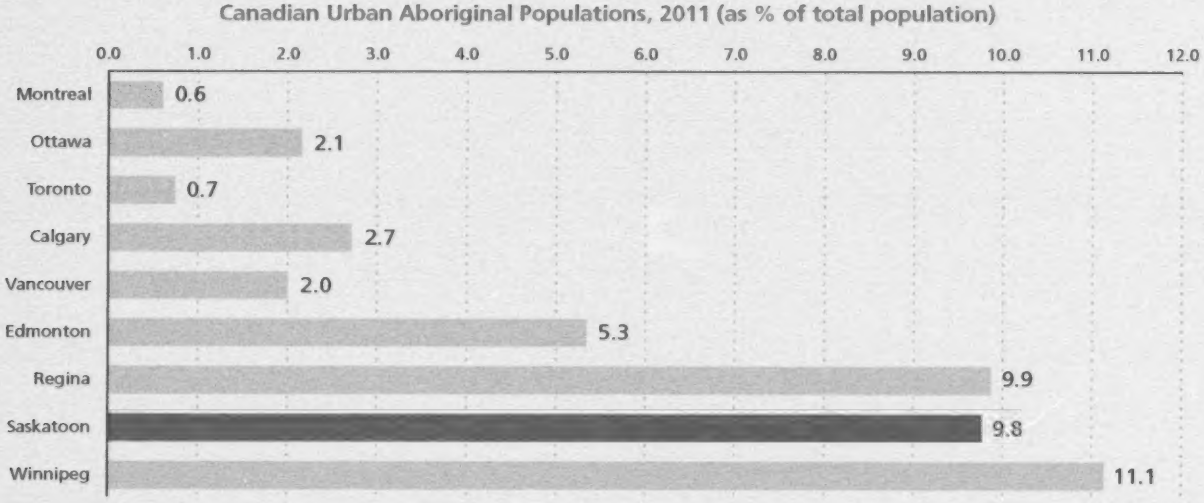
The number of newcomers to Saskatoon has increased astoundingly in recent years; according to Statistics Canada, Saskatchewan attracted approximately 370% more newcomers since 2006-2007. As Saskatoon's economy continues to grow, the City anticipates that more and more new newcomers will be moving to Saskatoon. Although immigration is a federal and provincial responsibility, the City of Saskatoon does play a role in providing support services to newcomers. The following graph suggests that over 6,000 newcomers have settled in the Saskatoon region in the last two years.



Source: Statistics Canada: National Household Survey 2011

Urban Aboriginal Population

The Aboriginal population is growing at a faster rate than the total population, due in part to a birth rate about 1.5 times the national average, and increasing numbers of people identifying themselves as Aboriginal. First Nations people comprise the majority (60%) of the Aboriginal population.

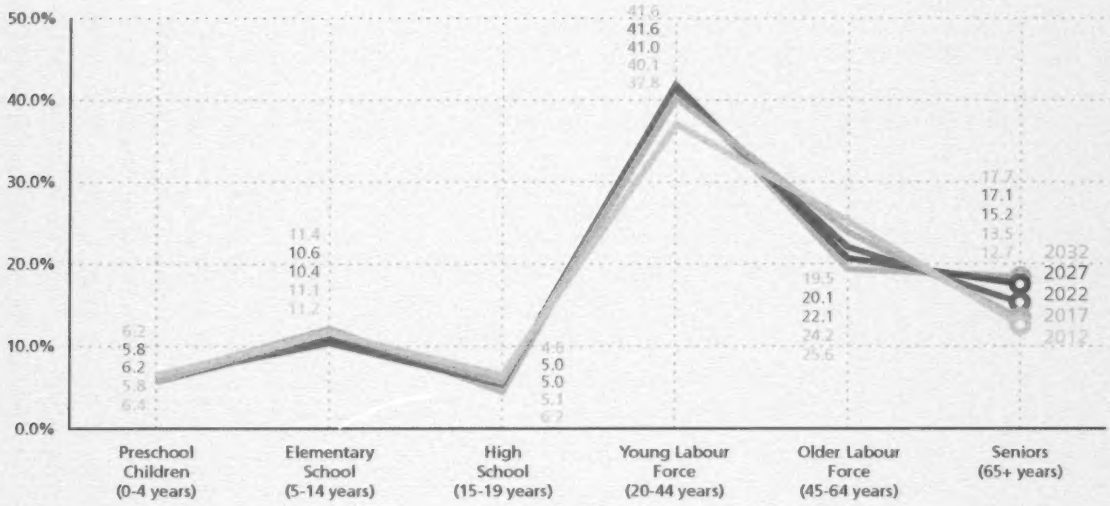


Source: Statistics Canada: National Household Survey 2011

Aging Population

According to Statistics Canada, Saskatoon had the youngest median age of any CMA in 2011 at 35.9. This compares to Canada's median age at 39.9. The aging of Saskatoon's population over the next 15 years will see the proportion of the population of labour force age (15-64) fall from 64.4% currently to 61.3% in 2026, and the seniors proportion rise from 11.4% to 15%.

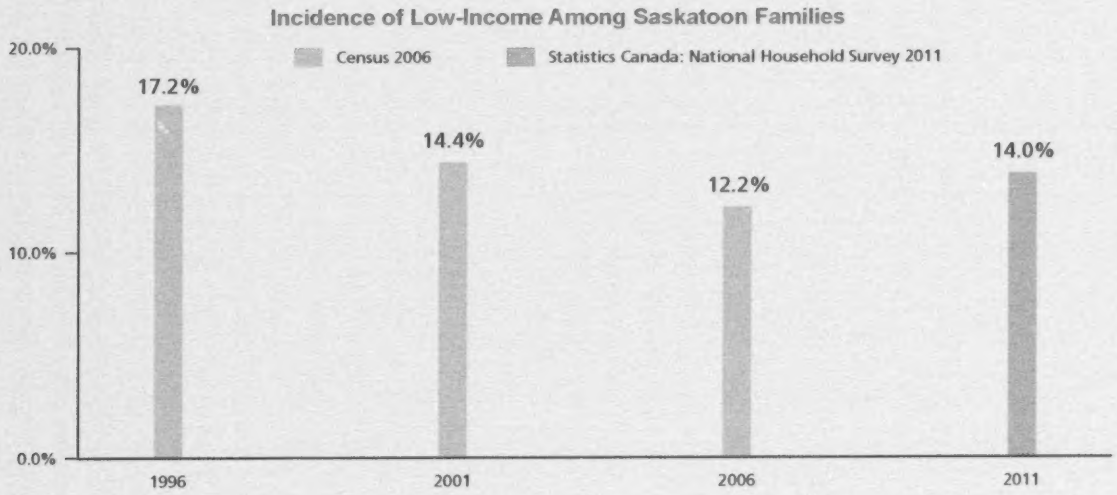
Saskatoon: Age Demographic as % of Total Population, 2012-2032



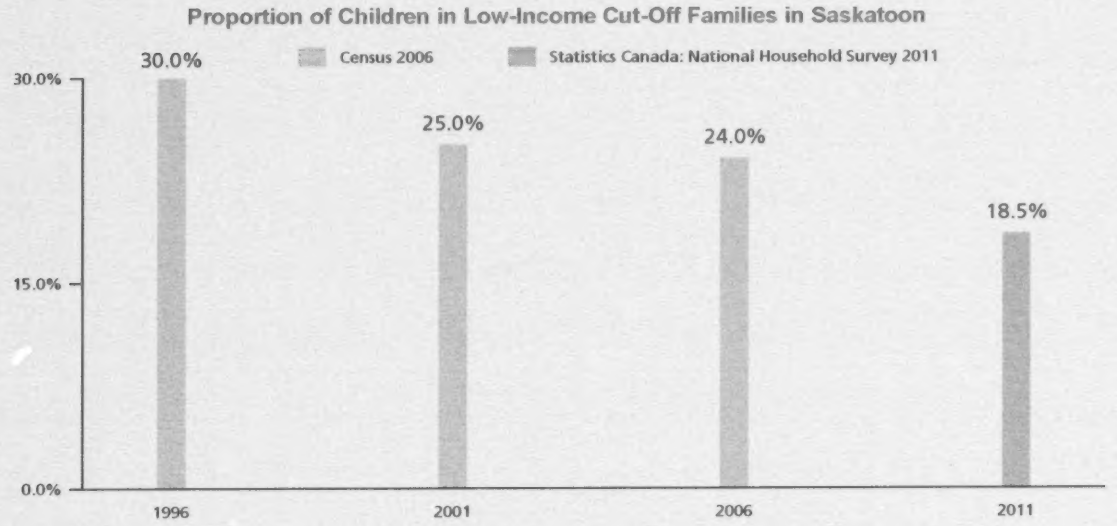
Source: City of Saskatoon & Saskatoon Census Metropolitan Area Population Projection 2012-2032 (Using Medium (2.5%) Growth Model)

Low-Income Saskatonians

In Saskatoon, the number of low-income families dropped between 1991 and 2011. Nonetheless, close to one in five children in Saskatoon lives in poverty.



Source: Statistics Canada, Census 1996-2006; Statistics Canada: National Household Survey 2011



Source: Statistics Canada, Census 1996-2006; Statistics Canada: National Household Survey 2011

Income distribution and support programs for low-income persons are not deemed to be a traditional role or responsibility for municipal governments. However, the City of Saskatoon does provide various programs to help low-income individuals and families access key programs and services. For example, the City offers low-income transit and recreation passes to ensure that low-income residents can have access to these important services.

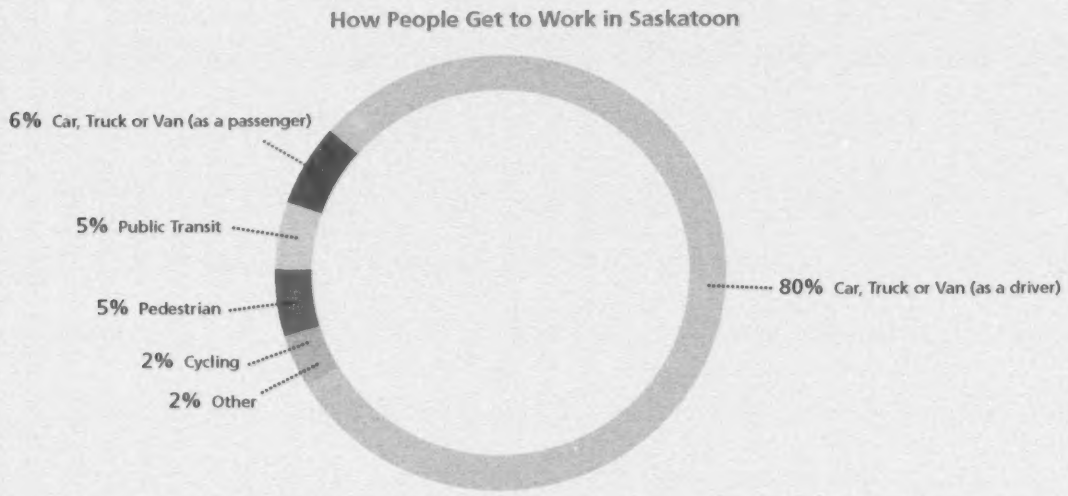
Environmental Trends and Issues

The citizens of Saskatoon value a healthy environment, including parks and open spaces, clean air, and safe drinking water. But as the city continues to grow, there will be corresponding pressures on these resources. For example, the city will have to find ways to address the pressures of:

- increasing park usage
- increasing water consumption
- rising greenhouse gas emissions
- more waste generation
- more absorption of available land to accommodate new industrial and residential developments

Modes of Transportation

Like most Canadian cities, the primary mode of transportation for Saskatoon commuters is the personal vehicle. The following chart shows that 86% of commuters use the automobile, as drivers or passengers, as their primary mode of transportation.


How People Get to Work in Saskatoon
6% Car, Truck or Van (as a passenger)
5% Public Transit
5% Pedestrian
2% Cycling
2% Other
80% Car, Truck or Van (as a driver)

Source: Statistics Canada: National Household Survey 2011

This reliance on the automobile obviously creates not only pressures on the environment, but it also creates pressures on the City's transportation costs, both capital and operating.

Public Transit Ridership

It is well documented that increased usage of public transit has a positive impact on the environment, as it helps to reduce the amount of greenhouse gas emissions produced in a particular community. According to Transport Canada, public transit offers many benefits:

- It offers the potential to reduce greenhouse gas emissions and smog in urban areas by improving services and offering Canadians greater flexibility in their transportation options.
- Investments make public transit more attractive and can induce a shift from auto travel to more fuel-efficient and cost-effective transit.
- Increased use of public transit can lead to a reduction of congestion levels, further improving energy use and air quality.

In order to realize these benefits, the City of Saskatoon will continue working to make transit a more convenient and reliable transportation option in 2013.

Despite the reliance on the automobile in Saskatoon, transit ridership has been steadily increasing in Saskatoon. A number of initiatives are planned to make taking the bus more attractive. In 2013 Saskatoon Transit introduced 'Direct' routes, an express service to get people from outer lying neighbourhoods to their destination quickly and conveniently and in 2014 GPS capability will be installed in the entire fleet meaning citizens and visitors will be able to track their bus online in real time. The trip planning software will also get a complete overhaul with this upgrade. In addition, the Transit Bus Eco-pass program gained further interest in 2012 as five new businesses signed on to the program. This program provides employers with a discounted bus pass for their employees, and the cost is shared between Saskatoon Transit and the employer.

In 2012, Saskatoon Transit had 12,777,458 passenger trips, over a 20% increase in ridership since 2007 (10,598,353).

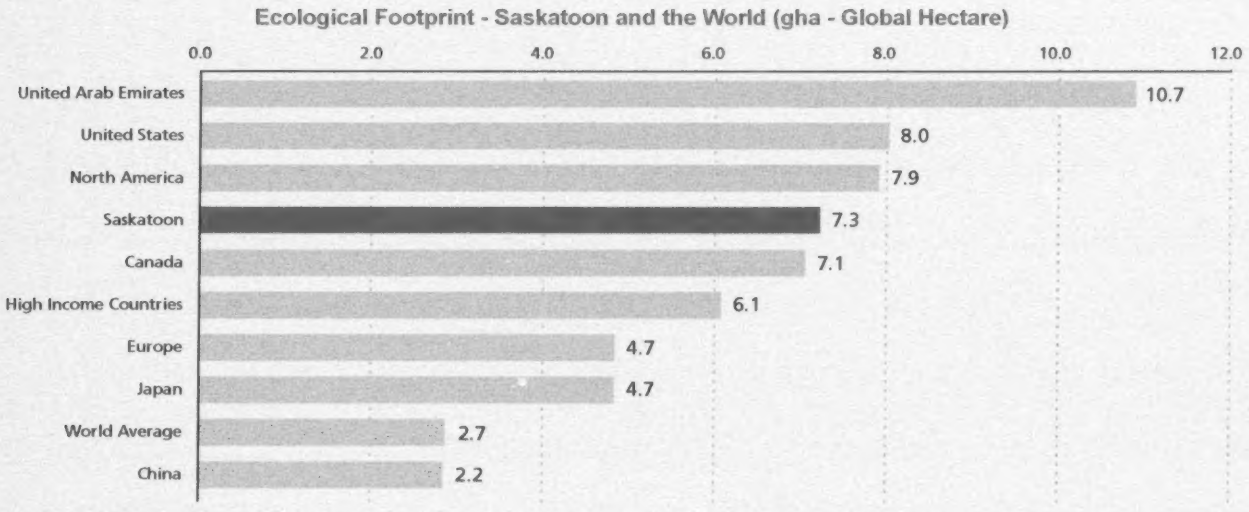
Source: Saskatoon Transit Annual Report, 2012

Ecological Footprint

As a city grows, it needs to acquire more land to accommodate new businesses and residents. However, the expanding geographic size of a city increases its ecological footprint. The Federation of Canadian Municipalities (FCM) defines an ecological footprint as:

> ***"...a measure of the demands humans place on nature. It shows how much biologically productive land and water we occupy to produce all the resources we consume and to absorb our waste. By measuring the present footprint, and then calculating the footprints for various household lifestyle or government policy options, more efficient ways of meeting human needs can be evaluated and implemented."***

According to FCM's 2006 analysis of ecological footprints of major Canadian cities and regions, Calgary and Edmonton had the highest municipal footprints. Saskatoon was on par with the national average. A growing ecological footprint obviously has an impact on environmental sustainability and increases the amount of greenhouse gas emissions produced in a community.

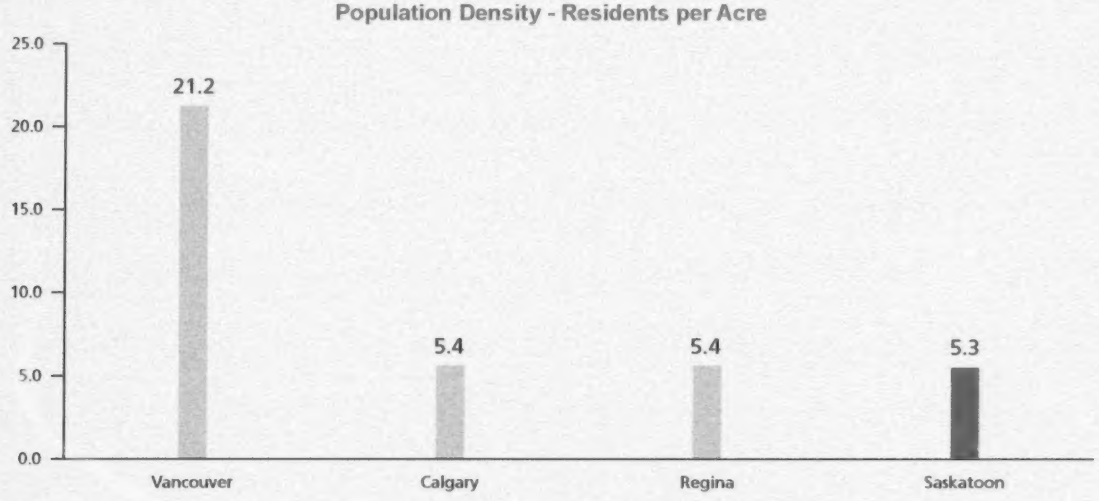


Source: City of Saskatoon Ecological Footprint Analysis, 2011

Population Density

One important way that cities can reduce their ecological footprints is by achieving greater population density targets. Population density is typically defined as the number of persons per square kilometre in a particular geographic area. Saskatoon has a low population density when compared with other major cities.

Contributing to this low density is the fact that Saskatoon added 40 square kilometres in 2010. This new land is expected to allow the City to grow to a population of 500,000. In addition, with the development of higher density targets in new neighbourhoods and new infill development in more established neighbourhoods, this number will undoubtedly improve in future years.



Source: Based on Statistics Canada, Census 2011 Population Figures

Waste Diversion

The City of Saskatoon's waste diversion initiatives direct materials that have value or purpose away from the landfill. Recycling and composting are examples of waste diversion programs that provide significant benefit to the community and region. There are many benefits of waste diversion:

- Recycling uses less energy than disposal in a landfill, and manufacturing with recycled materials is more energy efficient than with virgin materials.
- The greenhouse gas emissions generated by the landfill are reduced.
- Landfill airspace is preserved to avoid the need for a landfill.
- Reuse and recycling conserve resources.

Currently, the waste diversion rate for Saskatoon is 28.5% and the City diverts approximately 30,000 tonnes of materials from its landfill through the programs highlighted in the figure below. This number is expected to increase substantially in future years, as the City continues to expand, develop, and communicate waste diversion strategies and programs.

Organics and Recycling Trends - Municipal Programs Only 2006-2013(f)

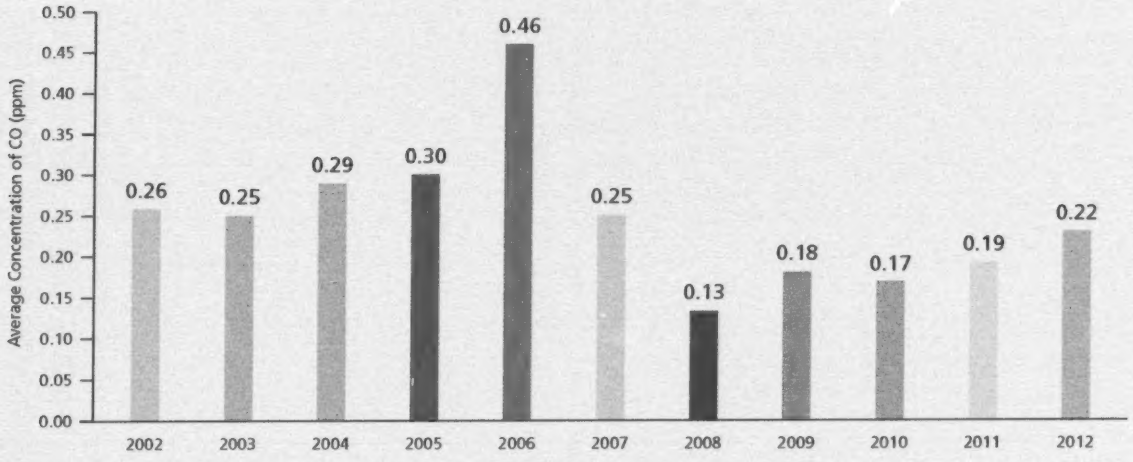
	2006	2007	2008	2009	2010	2011	2012	2013(f)
Residential/Commercial Compost Depot Drop-off	45	2,209	1,583	16,055	17,000	15,810	16,553	17,160
Fibre	6,571	7,239	7,258	7,542	7,675	7,828	7,984	8,150
Leaves Grass Subscription Program	99	144	309	530	748	840	995	840
Parks	28	419	835	841	980	1,350	952	1,000
Backyard Composters	150	150	157	157	160	160	160	160
Christmas Trees	167	104	104	94	98	115	101	105
Steel Cans	71	71	77	83	87	79	72	40
Landfill Drop-off	935	1,405	799	0	0	0	0	0
Industrial/Commercial Bulk Sources	0	0	0	24	50	0	0	0
Infrastructure Services		241	474	28	10,000	0	0	0
Curbside Recyclables (mixed)	0	0	0	0	0	0	0	12,000
TOTAL	8,065	11,983	11,596	25,354	36,798	26,182	26,817	39,455

Source: City of Saskatoon

Air Quality

Poor air quality has been linked to a number of health concerns in humans, ranging from eye and nose irritation to severe respiratory problems including lung cancer. Carbon monoxide or CO, is one of the common airborne contaminants in the air we breathe. Average concentrations of CO can fluctuate from year-to-year, as indicated in the figure below. CO along with fine particulate matter, nitrogen dioxide, ground-level ozone, and sulphur dioxide are used by the province's Ministry of Environment to calculate the Air Quality Index. Saskatoon has maintained a Good rating on this index from 2000-2012.

Historical Air Quality Measures in Saskatoon



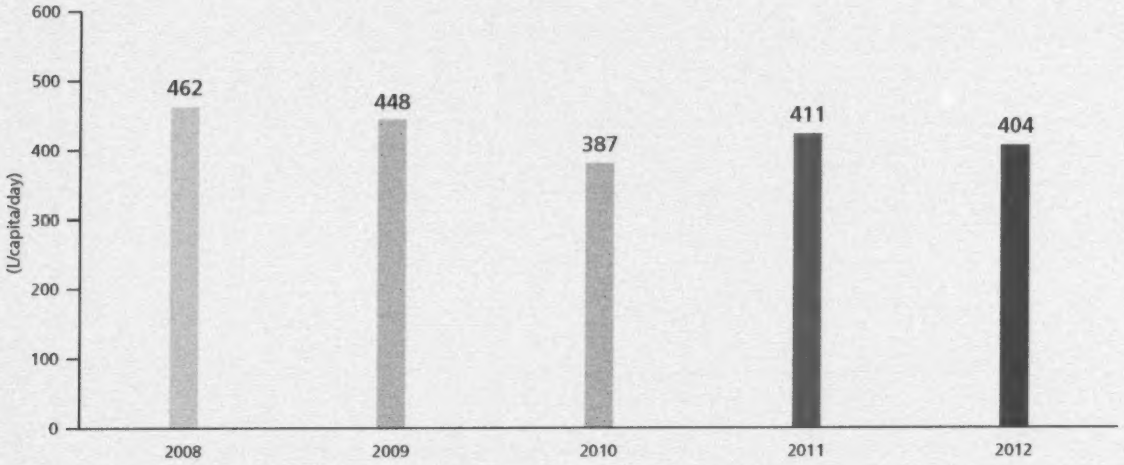
Source: Province of Saskatchewan

Daily Water Consumption

Another key environmental trend is the amount of water consumed in a community. Treatment and distribution of water require huge inputs of energy, corresponding to greenhouse gas emissions. These impacts in addition to the demands on the City's water and wastewater infrastructure are significant. In response, the City recently launched its 'Be Water Wise' campaign, as an educational tool to conserve water use by the residential sector.

Total water sales in 2012 were 34.9 million cubic metres, a slight drop in volume from the previous five-year average of 36.0 million cubic metres. However, water use is sensitive to weather conditions, with years of relatively high precipitation rates, such as 2012, corresponding to reductions in water used for residential and commercial irrigation.

Daily Domestic Water Consumption in Saskatoon



Source: City of Saskatoon and SaskWater

With respect to the 2010 and 2011 results, it is recognized that climate conditions contributed significantly to the water consumption reduction as rainfall in 2010 and 2011 was above average.

2013 Input by the Citizens of Saskatoon

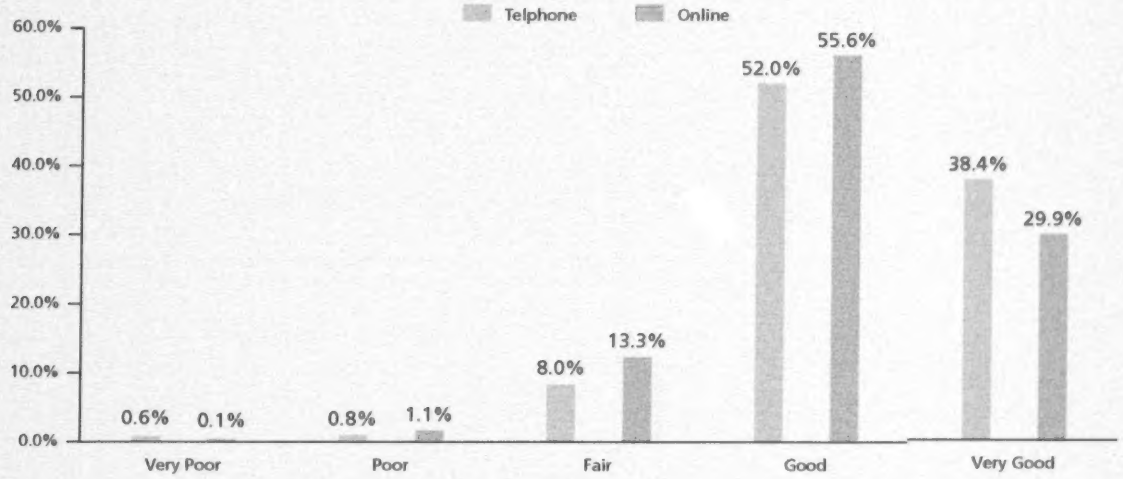
In order to ensure that the City of Saskatoon is dedicating its resources to the programs and services that citizens want, the City actively seeks input from the people it serves. One method the City utilizes to accomplish this is by conducting a formal, random survey of its citizens.

In the spring of 2013, the City of Saskatoon engaged Insightrix Research Inc. to conduct an annual Civic Services Survey. Between May 21st and June 7th, 2013 a total of 500 randomly selected households participated in the survey via telephone, and 813 respondents participated online.

The primary purpose of this survey was to gauge the opinion of the citizens of Saskatoon on a variety of issues including their perceptions about the quality of life in our city, and the various types and levels of service they receive from the City of Saskatoon. The survey results assist the Administration and City Council in making key budgetary and public policy decisions about the types and levels of services that the City of Saskatoon provides to its residents. The key results from this survey are as follows.

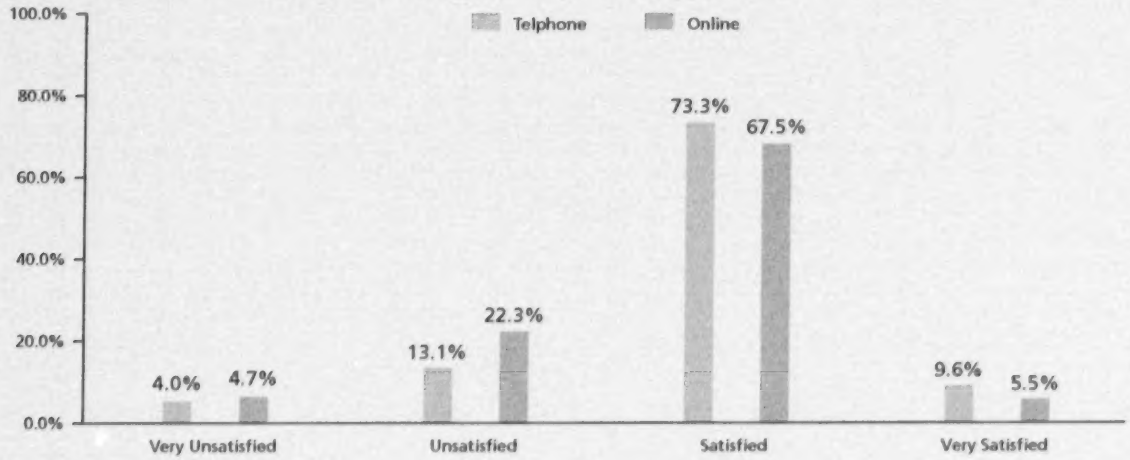
Current Perceived Quality of Life in 2013

Overall, the vast majority of respondents (phone: 90.4%, online: 85.5%) rate the quality of life in Saskatoon as either good or very good. Less than one in ten rate the quality of life as fair (phone: 8.0%, online 13.3%), and a very small proportion (phone: 1.4%, online: 1.2%) rate it as either poor or very poor.



Overall Satisfaction With Civic Services in 2013

A strong majority of respondents are either satisfied or very satisfied (phone: 82.9%, online: 73.0%) with the overall level of services provided by the City of Saskatoon. Note that the largest proportion of respondents is satisfied (phone: 73.3%, online: 67.5%) as opposed to very satisfied (phone: 9.6%, online: 5.5%), suggesting that these residents can identify some areas for improvement. Fewer respondents report not being satisfied (phone: 17.1%, online: 27.0%).

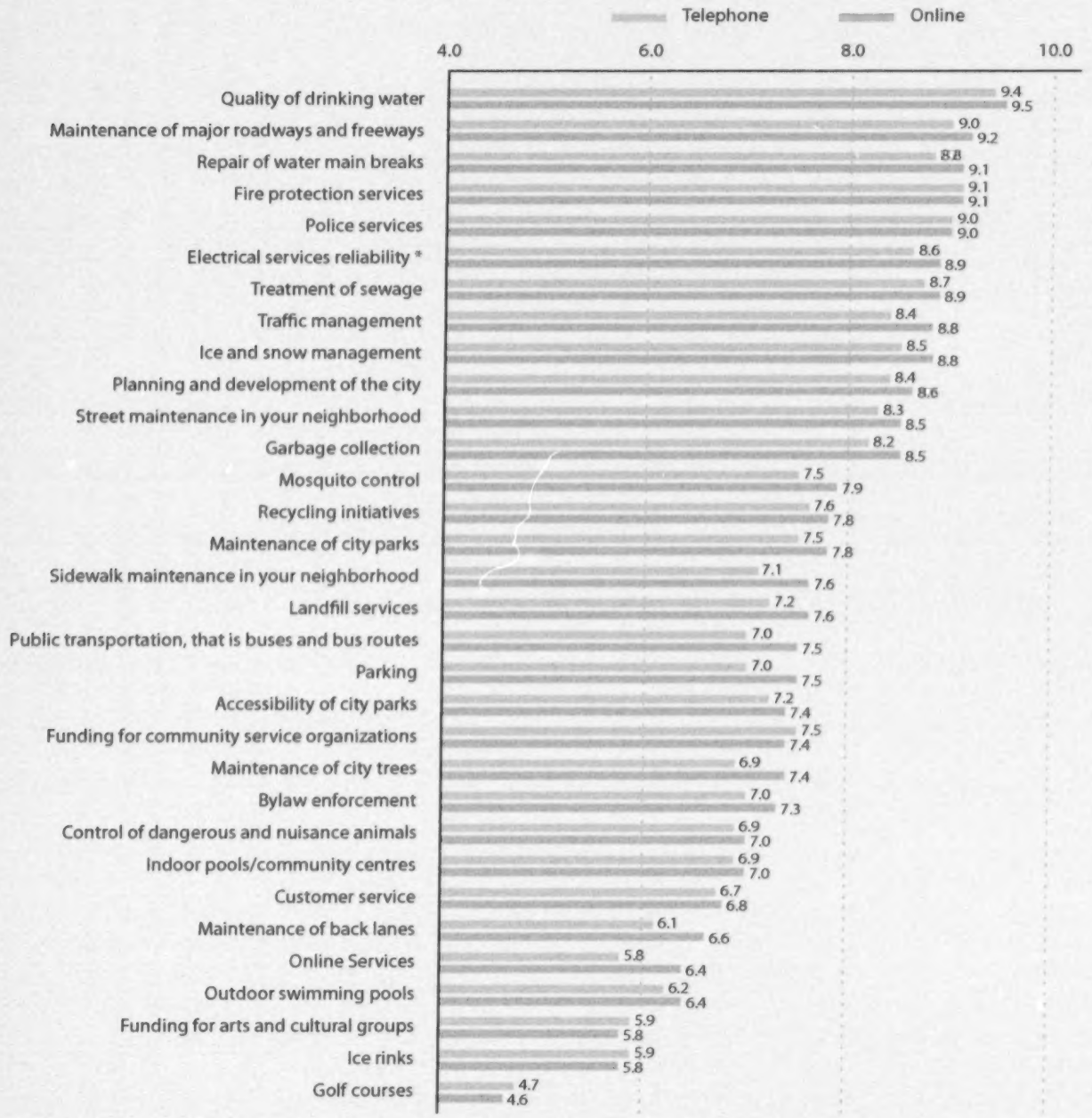


Importance of Specific Civic Services in 2013

Respondents were asked to rate the importance of a wide range of civic services available to citizens using a scale from one to ten, where one means that the service is not at all important and should not be given top priority, and ten means the service is extremely important and should be given top priority. A five means the service is neither important nor unimportant. For ease of reporting, these services have been coded for the City by department.

Similar to the previous wave of the study, the services that respondents rated highest in terms of importance include the quality of drinking water, the maintenance of major roadways and freeways in the city, the repair of water main breaks, fire protection services and police services. For the most part, results are more or less consistent between phone and online respondents.

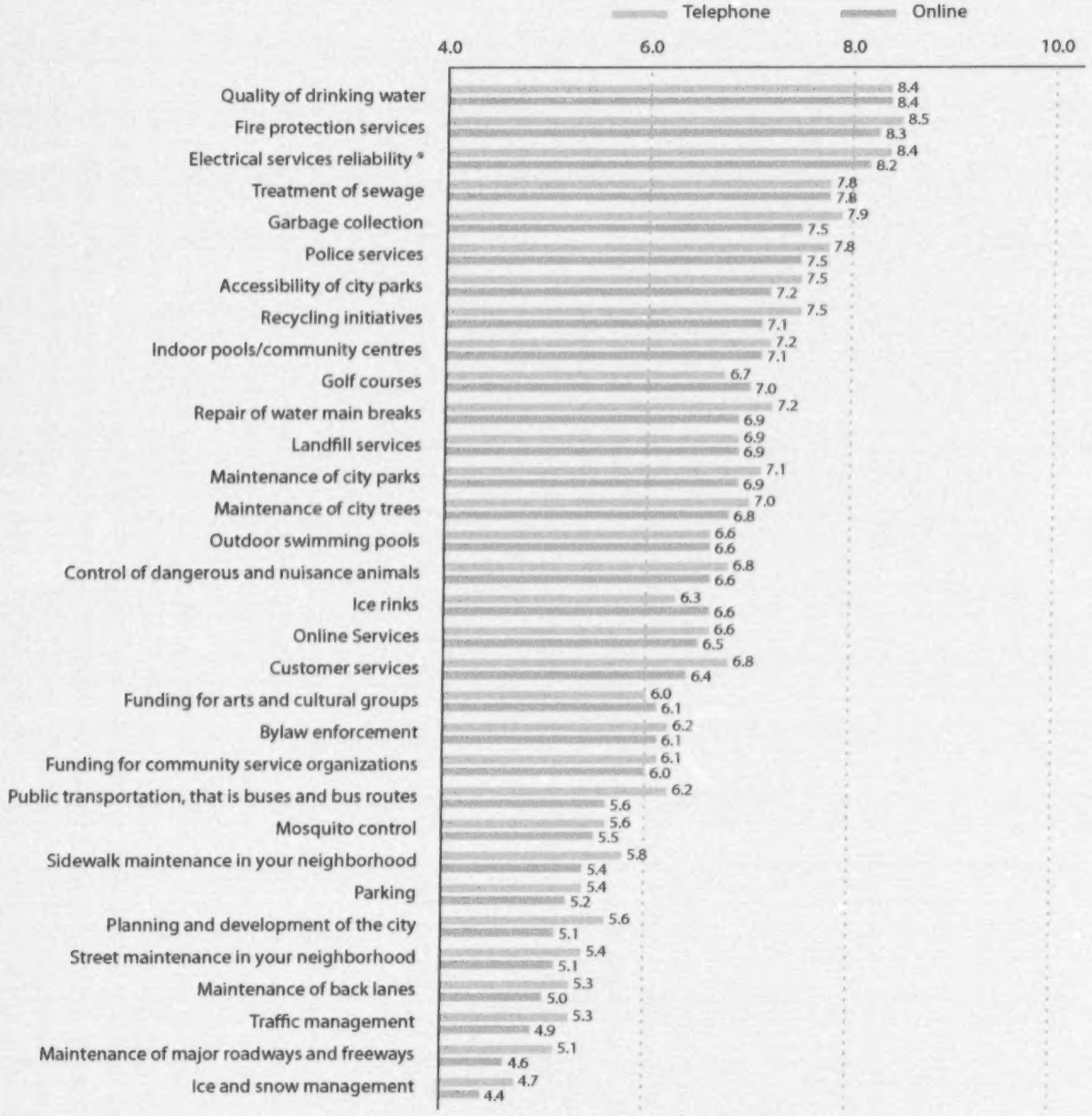
What Are the Most Important Civic Services to the Residents of Saskatoon in 2013?


Telephone
Online
4.0
6.0
8.0
10.0
Quality of drinking water 9.4 9.5
Maintenance of major roadways and freeways 9.0 9.2
Repair of water main breaks 8.8 9.1
Fire protection services 9.1 9.1
Police services 9.0 9.0
Electrical services reliability * 8.6 8.9
Treatment of sewage 8.7 8.9
Traffic management 8.4 8.8
Ice and snow management 8.5 8.8
Planning and development of the city 8.4 8.6
Street maintenance in your neighborhood 8.3 8.5
Garbage collection 8.2 8.5
Mosquito control 7.5 7.9
Recycling initiatives 7.6 7.8
Maintenance of city parks 7.5 7.8
Sidewalk maintenance in your neighborhood 7.1 7.6
Landfill services 7.2 7.6
Public transportation, that is buses and bus routes 7.0 7.5
Parking 7.0 7.5
Accessibility of city parks 7.2 7.4
Funding for community service organizations 7.5 7.4
Maintenance of city trees 6.9 7.4
Bylaw enforcement 7.0 7.3
Control of dangerous and nuisance animals 6.9 7.0
Indoor pools/community centres 6.9 7.0
Customer service 6.7 6.8
Maintenance of back lanes 6.1 6.6
Online Services 5.8 6.4
Outdoor swimming pools 6.2 6.4
Funding for arts and cultural groups 5.9 5.8
Ice rinks 5.9 5.8
Golf courses 4.7 4.6

*Exclude households that have SaskPower as their electricity provider.

Assessment of City's Performance Delivering Civic Services in 2013

In addition to rating civic services by importance, respondents were also asked to rate them according to how well they believe the City is doing in delivering the services. The services that respondents rate highest include the quality of the drinking water, fire protection services, and reliability of electrical services.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Maintenance of back lanes 5.3 5.0
Traffic management 5.3 4.9
Maintenance of major roadways and freeways 5.1 4.6
Ice and snow management 4.7 4.4

*Exclude households that have SaskPower as their electricity provider.

Most Important Issue Facing Saskatoon in 2013

While respondents list a wide variety of issues that they feel should receive the greatest attention, the issues most commonly cited by respondents as the biggest issues facing the City of Saskatoon include road conditions (phone: 35.6%, online: 30.8%), traffic flow/congestion (phone: 13.0%, online: 14.6%), and planning for city development (phone: 10.6%, online: 13.4%). All other issues were indicated as most important by one in ten or fewer respondents.